a fleet in motion

Utilisation Management System (UMS) user guide

3 Frequently asked questions (FAQs) and troubleshooting

Version 1, 05/12

This manual is useful for all users of the UMS and outlines solutions to commonly asked questions and issues.

Department of Housing and Public Works

QFleet

Table of contents

1 About this document 3

2 How do I use this guide? 3

3 FAQs – Frequently Asked Questions 4

How do I get added to UMS as a user? 4

What do I do if my user details or email address changes? 4

Can I use UMS with other browsers apart from Internet Explorer? 4

When does UMS send emails to users? 4

What is the importance of Check In and Check Out? 5

Can multiple users create booking requests in UMS at the same time? 5

How will I know if a vehicle is unavailable due to repairs? 5

Does UMS replace the need for the completion of logbooks? 5

Can a driver create a booking request on behalf of another driver? 6

Can another employee pick up a vehicle on behalf of the driver registered in the Booking Request? 7

Does the Calendar application automatically refresh? 7

A replacement vehicle has been received from the dealership. What needs to happen in UMS? 7

What is a Primary Driver? 8

Should I delete records in UMS? 8

Can I create a 'Generic User' in UMS? 9

4 Troubleshooting 9

Error message displays "Login failed. Please check your username and password and try again" 9

Error message displays "You have attempted to access a resource on the server…" 10

Error message displays "Error connecting to Web Services – HTTP request error" 10

Internal network or connectivity problems are affecting access to UMS. What can we do to manage our vehicle bookings? 11

The Vehicle Allocation screen won't allow me to select a vehicle to allocate to a booking 12

Validation message - "The Booked For user already has a booking during this time" when allocating a vehicle to a booking 12

Validation message - "The scheduled start and end date/time of the booking has passed" 12

Validation messages – vehicles already booked 13

Primary Driver already booked 13

Booking(s) already exist in that period 13

1 About this document

The FAQs and troubleshooting guide provides support to clients for common Utilisation Management System (UMS) issues or questions in a user-friendly format. This guide is the first location to find solutions for UMS issues.

If your answer is not included in this guide, refer to one or more of the UMS User Guides for full instructions.

The below listed UMS User Guides are available on UMS, Fleetscape and CAS:

- Getting Started User Guide – about UMS and vehicle utilisation, login, support, role matrix. Useful for all UMS users.
- Quick reference guide for drivers – This manual is a short how-to guide for drivers.
- FAQs and Troubleshooting Guide – Frequently asked questions regarding UMS, extra hints and tips for all users.
- Client Administrator Application User Guide – how to setup and implement UMS and maintain the system. Useful for Client Administrators.
- Calendar Application User Guide – how to allocate vehicles and manage booking requests. Useful for PMO Managers, and PMO Officer (with limited access).
- Booking Application User Guide – how to book vehicles. Useful for drivers.
- Implementation Pack – Installation and setup information, templates, training exercises. Useful for Client Administrators.

2 How do I use this guide?

The FAQs and Troubleshooting guide consists of two sections. Sections include:

1. Frequently Asked Questions (FAQs) – provides a list of UMS common user questions in a questions and answer format.

2. Troubleshooting – provides instructions on how to solve a common UMS issue or error message.

Handy tips and hints will also be provided throughout the user guide and will be highlighted by our guru pictured to the left. These may include best practices, examples or other important information.

3 FAQs – Frequently Asked Questions

How do I get added to UMS as a user?

Your Client Administrator will create a user Profile for you in UMS depending on your access or booking requirements. There are two types of users in UMS:

- User has access to UMS and usually makes their own booking requests or requires access as another role in UMS e.g. PMO Manager.
- Walkup has no access to UMS but still needs to be setup as a driver requiring a vehicle. Details are required in UMS if someone else e.g. PMO Manager, makes booking requests on their behalf.

If you require UMS access to create your own booking requests contact your Client Administrator and complete the required authorisation documentation providing a copy of your current valid drivers licence.

If you don't require UMS access and the PMO Manager is to complete booking requests on your behalf, contact your Client Administrator and complete the required authorisation documentation, providing a copy of your current valid drivers licence. Your UMS user profile will be setup as 'Walkup Only'.

What do I do if my user details or email address changes?

Your UMS must reflect the user's current details. Contact your PMO Manager or Client Administrator if you change your email address, name, employee number or phone number. UMS must be updated accordingly.

Can I use UMS with other browsers apart from Internet Explorer?

No. UMS is only accessible using Internet Explorer. Other browsers e.g. Firefox, Chrome, Safari, Opera will not provide access to UMS.

When does UMS send emails to users?

Drivers are the only users who receive automatically generated emails by UMS.
Emails are sent as confirmation that the following updates are completed in the Calendar application, by a user with PMO Manager access:

- Allocating a vehicle from the unallocated booking queue.
- Allocating a vehicle using the Add function.
- Change Vehicle option in the Allocated Booking menu
- Cancelling a booking.

If an automated email is not received by the driver, the driver's email address may have changed since they created the booking request. The Client Administrator should check the email address with the driver, and edit their User Profile accordingly.

What is the importance of Check In and Check Out?

The following points contribute to the importance of Check In and Check Out in UMS:

- Check In and Check Out procedures update the UMS with the actual start and end times respectively for a journey.
- UMS enables PMO Managers to view the availability of vehicles. Timely updates allow these officers to make decisions about vehicles and bookings in real time.
- UMS enables reporting of vehicle utilisation according to the 'actual time' of the journey. Effective vehicle utilisation management is required by agencies according to the QFleet Fleet Efficiency and Utilisation Policy for the Queensland Government motor vehicle fleet (the FE&U Policy). This document is available on the QFleet website.

Any delay in updating the UMS requires the PMO Manager's intervention including the correction of booking times. PMO Managers should monitor the UMS throughout the day.

If the vehicle was picked up or dropped off at different times than those entered in the Booking Request e.g. unforeseen traffic hold-ups, emergencies etc, enter details of the time variations and the reason for the changes in the Notes field of the Check In Vehicle screen. This will assist if utilisation history is required in the future for a vehicle that was not actually used for the times allocated in the Booking Request or Vehicle Allocation screens in UMS.

Can multiple users create booking requests in UMS at the same time?

Yes. There is no impact to UMS if more than one driver is creating a booking at the same time. Refer to various instructions in the Troubleshooting section of this guide regarding Validation messages that may display if the vehicle is already booked, or if a Primary Driver is attached to the vehicle etc.

How will I know if a vehicle is unavailable due to repairs?

The PMO Manager will have moved the vehicle from the Pool to a 'Servicing Pool' until repairs are completed. Therefore the vehicle will not be available for selection in that Pool in either the Calendar application when allocating vehicles, or the Booking application when creating booking requests.

Alternatively, the vehicle could be booked out for the period of the service requirements. However be aware the user assigned to the serviced vehicle booking will not be able to be allocated to another booking.

Refer to the **Client Administrator User Guide - Moving Vehicles between Pools**, for further information.

Does UMS replace the need for the completion of logbooks?

No. It is still compulsory for logbooks to be completed including the monthly reconciliations and input into Betasphere FBT.

Therefore:

- All vehicles (QFleet leased, SES vehicles where there is business travel, hire vehicles hired longer than 5 days) must have log books completed.

- Every journey in a logbook for all vehicles must have a corresponding journey in UMS that is administered in terms of the UMS User Guides. There are no exceptions except SES private usage.
- Users viewing UMS data including bookings and vehicles rely on the information to be current in real time.
- UMS and logbook data is subject to audit by your Internal Audit and Compliance Business Units.
- Management and recording of vehicle utilisation is required by agencies according to the QFleet Fleet Efficiency and Utilisation Policy for the Queensland Government motor vehicle fleet (the FE&U Policy). This document is available on the QFleet website.

Can a driver create a booking request on behalf of another driver?

Yes. However each agency has their own rules regarding booking vehicles on behalf of another driver. Contact your Client Administrator in the first instance for clarification of whether this process is allowed in your organisation, and if so, what guidelines and procedures must be followed.

It is imperative you understand the following points if you are booking a vehicle on behalf of another driver:

- When you enter a tick in the “Valid licence?” tick box in the Booking Request it is the driver who is responsible for ensuring they have a valid licence.
- If there is an accident, or if a speeding or parking ticket etc. is received during the journey it is ultimately the driver’s responsibility even though you made the booking on their behalf.

Some agencies require photocopies or scanned copies of driver’s licences to be held on file for each driver. A quick check of your agency’s driver records will determine the validity of drivers’ licences.

To book a vehicle on behalf of another driver, follow these steps:

1. Enter the surname of the driver in the Driver field in the Booking Request screen. If you are not driving the vehicle, do NOT enter your own name in this field.

Booked For Driver Details
Organisation:
Driver:
dolenz
Search
Office Phone:
Contact Phone for this booking:
Cost Centre for this booking:
na
Valid Licence?
I hereby acknowledge that I have a driver's licence current and valid for the type of vehicle I will be driving and all areas and regions in which I will be driving it.
Create Booking
Return to Worklist
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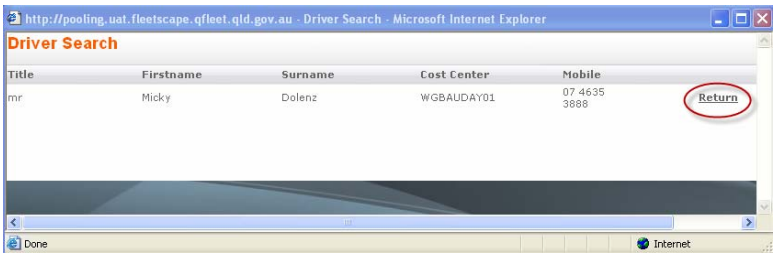
2. Click on Search. The Driver Search screen displays a list of all drivers matching the Surname entered.

3. Scroll down the list to the correct drivers record, then scroll across the screen to view the Return link.



4. Click on Return next to the correct driver of this booking. The New Booking screen displays with the driver's surname and first name in the Driver field.

5. Complete the booking request as required.

6. Refer to the UMS Booking Application User Guide for further information regarding Booking Requests.

Can another employee pick up a vehicle on behalf of the driver registered in the Booking Request?

Yes, only if your agency allows this. Consult your Client Administrator for any procedures that must be adhered to prior to picking up a vehicle on behalf of another driver.

If this action is required, enter the details of the 'pick up' requirements, including the name and contact details of the employee picking up the vehicle on behalf of the driver, in the Booking Request screen – Special Requirements field.

The employee picking up the vehicle must hold a valid licence, and the driver noted in the Booking Request should also have provided a copy of their valid licence to the PMO Manager prior to arranging the 'pick up'.

Does the Calendar application automatically refresh?

Yes. The Calendar application is automatically refreshed every 5 minutes. If you need to refresh before this time click on the UMS Refresh button in the Calender screen. DO NOT use the browser refresh button for this action.

A replacement vehicle has been received from the dealership. What needs to happen in UMS?

Refer to the Calendar Application User Guide for full instructions regarding Moving Vehicles between Pools. Additional suggestions are:

- Prior to moving the replaced vehicle from its current Pool, in the Client Administrator application, add the replacement vehicle in UMS, and assign it to the relevant PMO and Pool.
- In the Calendar application use the Allocated Booking menu. Reallocate each booking that is allocated to the replaced vehicle to the new vehicle. A New Allocation email advice is sent to the driver for the new vehicle.
- When all bookings have been reallocated to the new vehicle, remove the replaced vehicle from the current Pool in the Client Administrator application.

For further information refer to the FAQ in this document – Should I delete records in UMS?

Also refer to Deleting Vehicle Details in the Client Administrator Application User Guide prior to deleting the record of the returned vehicle.

What is a Primary Driver?

If a driver obtains authority to home garage a vehicle over an extended period a system notation called Primary Driver can be enabled in UMS to link the driver's User Profile to the vehicle. The notation generates a warning about the Primary Driver being active however the warning can still be overridden to book the vehicle if the Primary Driver is not using the vehicle at the required time.

If there is a Primary Driver allocated to the vehicle this is identified with a 'face icon' next to the vehicle registration number on the Calendar screen.
The Booking Status bar on the Calendar screen is also coloured **Dark Teal** during Primary Driver times.

Refer to Troubleshooting in this document – Primary Driver already booked, for further information regarding overriding a Primary Driver time to allocate another booking to the vehicle.
Refer to the Client Administrator User Guide – Adding a Primary Driver to a Vehicle, or the Calendar Application User Guide – Primary Driver Icon for further information.

Should I delete records in UMS?

NO! Records should never be deleted in UMS unless you have received confirmation from your QFleet SAM to do so. Only Client Administrators should delete records after being absolutely sure all relevant steps have been taken and reports are generated as required to maintain data records if necessary.

If you are unsure whether to continue deleting records, always contact your SAM prior to deleting, for further advice.

The following actions are completed in UMS when deleting records:

- **Deleting Users** – If a user needs to be deleted for privacy and security reasons if they leave the organisation, ensure you have retained all necessary records of the user's booking history prior to deleting their profile.
    - All history of previous bookings will also be deleted from UMS.
    - Fees may be charged to restore users that were deleted in error.

An alternative practice to deleting users is to change a user's password that only Client Administrators have access to. This action will retain all history of the user in the UMS, while securing UMS from their access.

- **Deleting Vehicles** All history of the vehicle usage and allocation will also be removed. When a vehicle is returned to QFleet DO NOT delete it from UMS. It should only be removed from your Pool. Ensure you remove any vehicle allocations or primary drivers attached to a vehicle before removing the record. Drivers will not be able to be assigned to another vehicle if they are still assigned to the removed vehicle.

- **Deleting PMOs**
    - All Pools in the PMO will be **permanently** deleted from the database.
    - All vehicles in all pools will be moved to the unallocated vehicles list.
    - All Active bookings will be marked as Completed.
    - All Completed bookings will be retained for statistical purposes.
    - All future and unallocated bookings will be permanently deleted.

- **Deleting Pools**
  - All vehicles in deleted pools will be automatically moved to the unallocated vehicles list and will need to be reallocated to another pool.
  - All Active bookings will be marked as Completed.
  - All Completed bookings will be retained for statistical purposes.
  - All future bookings will be moved to unallocated bookings and will need to be reallocated to another pool.

Refer to the Client Administrator Application User Guide - Deleting Vehicle Details for further information.

Can I create a 'Generic User' in UMS?

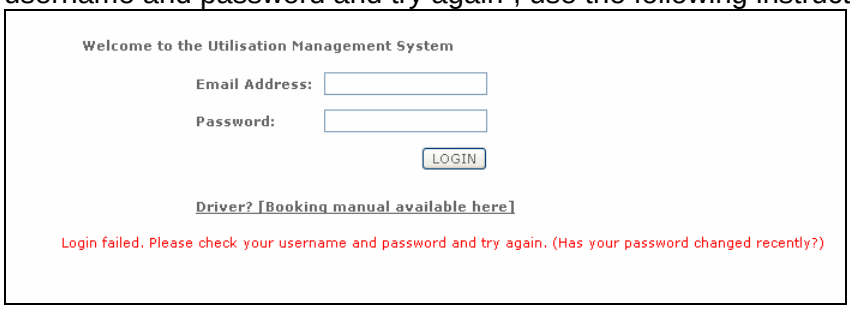
NO. Generic users should not be established in UMS for the following reasons:

- UMS integrity is compromised. UMS **must** reflect what is in the log books, including driver names.
- Vehicle accountability is at stake with generic users especially for infringement notices and accidents. All responsibility rests with the driver.
- UMS does not provide relevant reporting to identify generic users.
- If UMS is integrated with other systems, then generic users would compromise other system's data and reporting.

4 Troubleshooting

Error message displays "Login failed. Please check your username and password and try again"

If an Error Message displays while logging in to UMS, "Login failed. Please check your username and password and try again", use the following instructions:


Welcome to the Utilisation Management System
Email Address:
Password:
LOGIN
Driver? [Booking manual available here]
Login failed. Please check your username and password and try again. (Has your password changed recently?)

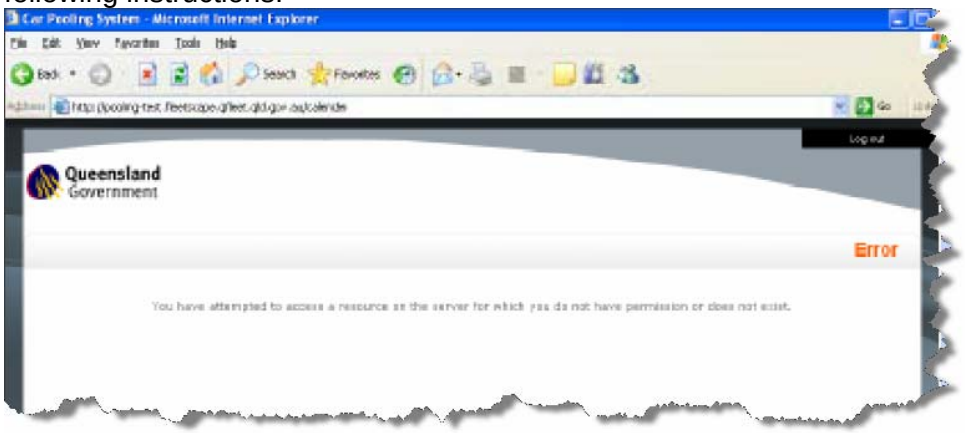
There are two main reasons why this message may be displayed:

- You have entered the incorrect password.
  - Re-enter your password correctly ensuring your Caps Lock key is off, and your Num Lock key is on.
- Your email address has changed since your last access in UMS.
  - Advise the Client Administrator to change the email address of your UMS User Profile.
  - Log in with the new email address.

If the above instructions do not solve your access problem contact your Client Administrator for further assistance.

Error message displays "You have attempted to access a resource on the server…"

If an Error Message displays while logging in to UMS, of "You have attempted to access a resource on the server for which you do not have permission or does not exist", use the following instructions:



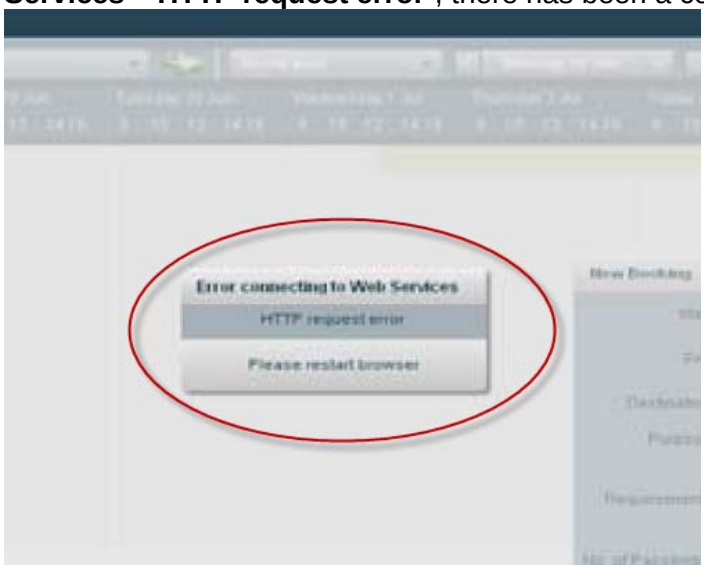
This error message displays when the access level of your Users Profile does not include the application you are attempting to login to e.g. you may only have access to one UMS application such as Booking application, and may have tried to access another UMS application e.g. Calendar application.

- Contact your Client Administrator to change your access level in your User Profile.
- Login correctly.

If the above instructions do not solve your access problem contact your Client Administrator for further assistance.

Error message displays "Error connecting to Web Services – HTTP request error"

When you are working in UMS and you receive an error message of "**Error connecting to Web Services – HTTP request error**", there has been a communication error with the QFleet server.



To reboot the connection, click on the Refresh button on your browser tool bar or press F5 on your keyboard. You do not need to restart the browser.
If the problem persists clear the Internet Explorer settings. Refer to the Troubleshooting topic in this document for further information “Error message displays when attempting to log in “You have attempted to access a resource on the server…”

Internal network or connectivity problems are affecting access to UMS. What can we do to manage our vehicle bookings?

Contact your organisation’s IT support for assistance in the first instance, then until connectivity is restored, business units should tailor a temporary workaround to suit their operational needs.

Consider the following suggestions as workarounds:

While UMS is unavailable:

- Screen dump bookings for the next day (7am to 7pm) using the Print function at the bottom of the Calendar screen.
- Contact another business unit that has access to UMS. They could provide screen dumps for the day OR update UMS until your connectivity is restored.
- Drivers provide hard copies of their vehicle allocation advice emails in advance of their bookings, or forward the emails to the PMO Manager. If that is not possible they need to advise PMO Managers of their vehicle needs for the day/evening.

When UMS access is restored:

Update UMS ensuring UMS reflects what is in all logbooks for all journeys started and completed since UMS was last updated (odometers, destination, purpose, start and end time of journey).

- Existing allocated booking - past due:
  - Select Complete from the booking menu.
  - Amend the booking to update all details.
- No booking in UMS (journey is in the past):
  - Use the Add function ensuring the Retrospective box is ticked to create a Completed booking.
  - Enter information in odometer, destination and purpose fields in the Amend Booking screen.

If you are expecting a scheduled loss of connectivity then possible contingencies could be:

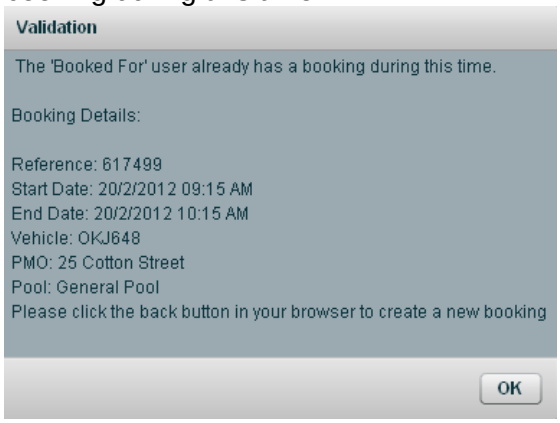
- Screen dump bookings for the next day using the Print function at the bottom of the UMS Calendar screen.
- Advise all drivers to forward confirmation emails or advice of booking requests required during the scheduled time.
- Ensure other relevant business units, all drivers and other relevant staff are aware of both the scheduled loss of connectivity, and the strategies and requirements of the workaround so vehicle allocation can continue with minimal or no issues.

The Vehicle Allocation screen won't allow me to select a vehicle to allocate to a booking

Ensure you have highlighted the booking you are trying to allocate a vehicle to. The booking details will change to a blue colour. Then select a vehicle to allocate to the booking by clicking on the Select button, then Book Invoicing.
Refer to the Calendar Application User Guide - Standard Vehicle Allocation Process for further information.

Validation message - "The Booked For user already has a booking during this time" when allocating a vehicle to a booking

Calendar application - When you are trying to allocate a vehicle to a booking request in the Vehicle Allocation screen the following message displays if the 'Booked For' user already has a booking during this time.


Validation
The 'Booked For' user already has a booking during this time.
Booking Details:
Reference: 617499
Start Date: 20/2/2012 09:15 AM
End Date: 20/2/2012 10:15 AM
Vehicle: OKJ648
PMO: 25 Cotton Street
Pool: General Pool
Please click the back button in your browser to create a new booking
OK

Click OK to return to the booking request and amend the driver or time for the booking.

Validation message - "The scheduled start and end date/time of the booking has passed"

Calendar application - When you are processing the Check Out of a vehicle which has start and end dates of the journey in the past, then click on **OK**, the following validation message is displayed:

Validation
The scheduled start and end date/time of the booking has past.
Please amend the booking time before checking out
OK

Click on OK to return to the booking request and perform one of the following actions:

- If the vehicle is to be used for a journey at a different time, but it hasn't been checked out:
  - Complete the booking.
  - Amend the booking to display correct journey times and odometer readings as per the log book, purpose and destination.
- If the vehicle was not used for the journey:
  - Cancel the booking.

– If the driver requires the vehicle for another journey, create a new booking.

Refer to the **Calendar Application User Guide – Vehicle Allocation**, for further information.

Validation messages – vehicles already booked

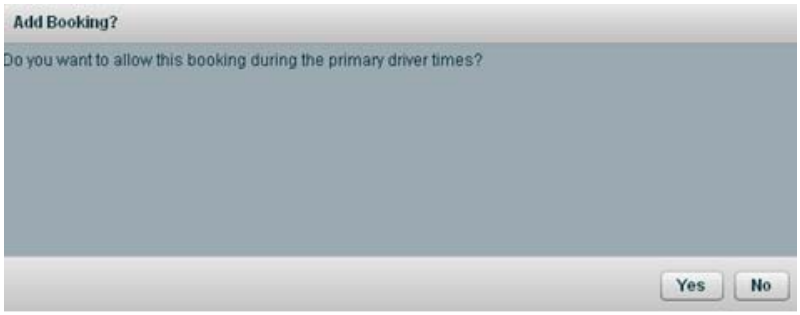
Calendar application - If a vehicle is already booked on the days of the journey from another booking request, or if Primary Driver times are assigned to that vehicle, validation messages are displayed when completing a vehicle allocation. Primary Driver times may be overridden if required, but a vehicle may not be allocated to more than one booking at the same time.

Refer to the topics below for further information regarding:

- Primary Driver already Booked, and
- Booking(s) already exist in that period.

Primary Driver already booked

The following message is displayed if there is a Primary Driver booked for the same times of the booking you are trying to allocate the vehicle to.

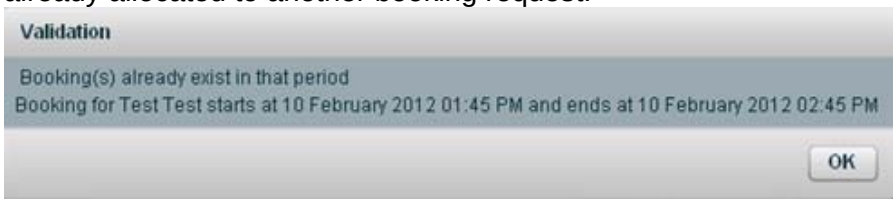


Click on **Yes** to allow the booking during the Primary Driver times or No to return to the Vehicle Allocation screen. If No is selected a different vehicle must be allocated to the booking.

Refer to FAQs in this document – What is a Primary Driver, or the Client Administrator User Guide – Adding a Primary Driver to a Vehicle, for further information.

Booking(s) already exist in that period

The following message displays if the vehicle you have selected for the booking request is already allocated to another booking request.


Validation
Booking(s) already exist in that period
Booking for Test Test starts at 10 February 2012 01:45 PM and ends at 10 February 2012 02:45 PM
OK

Click on **OK** to return to the Vehicle Allocation screen.
Options available are:

1. Un-allocate that vehicle from the booking request it is currently assigned to then allocate the vehicle to this booking request.
2. Allocate a different vehicle to this booking.

Refer to the **Calendar Application User Guide - Vehicle Allocation** for further information.